

# Release Notes

## N-FOCUS Major Release

### November 14, 2005

A major release of the N-FOCUS system is being implemented on November 14, 2005. This document provides information explaining new functionality, enhancements and problem resolutions effective with this release. This document is divided into four main sections:

- ♦ **General Tips and Mainframe Topics:** ALL N-FOCUS USERS should read this section.
- ♦ **Protection and Safety:** ALL N-FOCUS USERS whose work responsibility includes either CHILD PROTECTIVE or ADULT PROTECTIVE SERVICES; it will be noted when the information is specific to only one of these areas.  
**NOTE:** Intake and Allegation topics are common to both CPS and APS program areas.
- ♦ **Developmental Disability Programs:** This section will be identified only when there are enhancements, tips and/or fixes specific to the DD programs in N-FOCUS. If you work with DD Programs in N-FOCUS, be sure to read the section "Mainframe and General Interest."  
**NOTE:** If you work with Medicaid cases that include DD Waiver programs, you should review any information included in the Developmental Disability Programs section.
- ♦ **Expert System:** Accessible to users with responsibility for case entry for the following programs; AABD/MED, ADC/MED, FSP, FW, IL, Medicaid, Retro MED.

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## General Tips & Mainframe Topics

### GENERAL TIPS

#### ERROR MESSAGES

##### *WHEN TO CALL PRODUCTION SUPPORT?*

Whenever you get an Error Message in N-FOCUS, CALL PRODUCTION SUPPORT! Do NOT click OK to see if you can get it to work. As a reminder, the Production Support phone numbers are: **(888)281-6629** (toll free), and **(402)471-9698** (local Lincoln).

#### CASE STATUS/PROCESSING

##### *MULTIPLE EXPERT SYSTEM SESSIONS (NEW)*

At the request of the N-FOCUS User Group, it is now possible to have a case checked out in the Expert System and navigate back to the mainframe to view another case without closing your case from the Expert System. This functionality will allow you to have more than one case checked out and opened to the Expert System Navigator window. Regardless of whether you choose to use this functionality, there are some differences to basic N-FOCUS navigation in the Expert System.

##### **Refer to the Expert System Section of Release Notes ...**

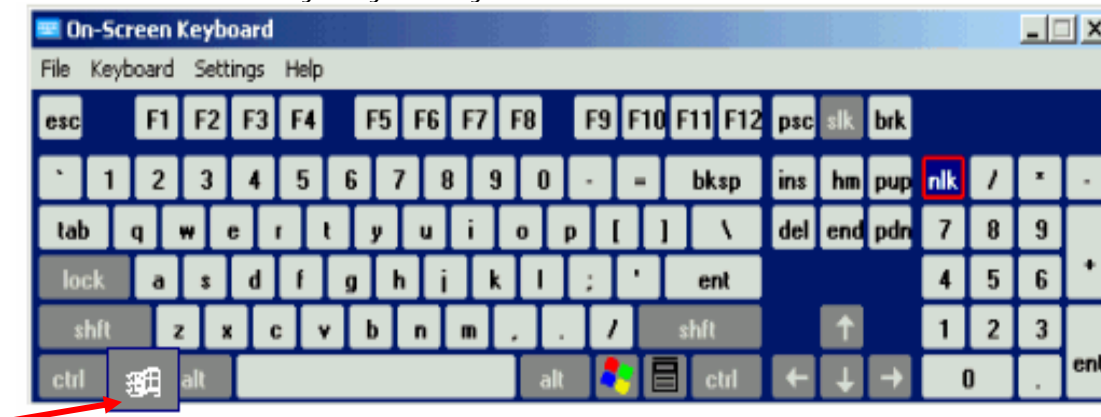
... for information on how to Open the case from the Case Status window once you have checked it out from the Detail Master Case window. (see page 26)

#### BASIC WINDOWS® NAVIGATION CHANGES

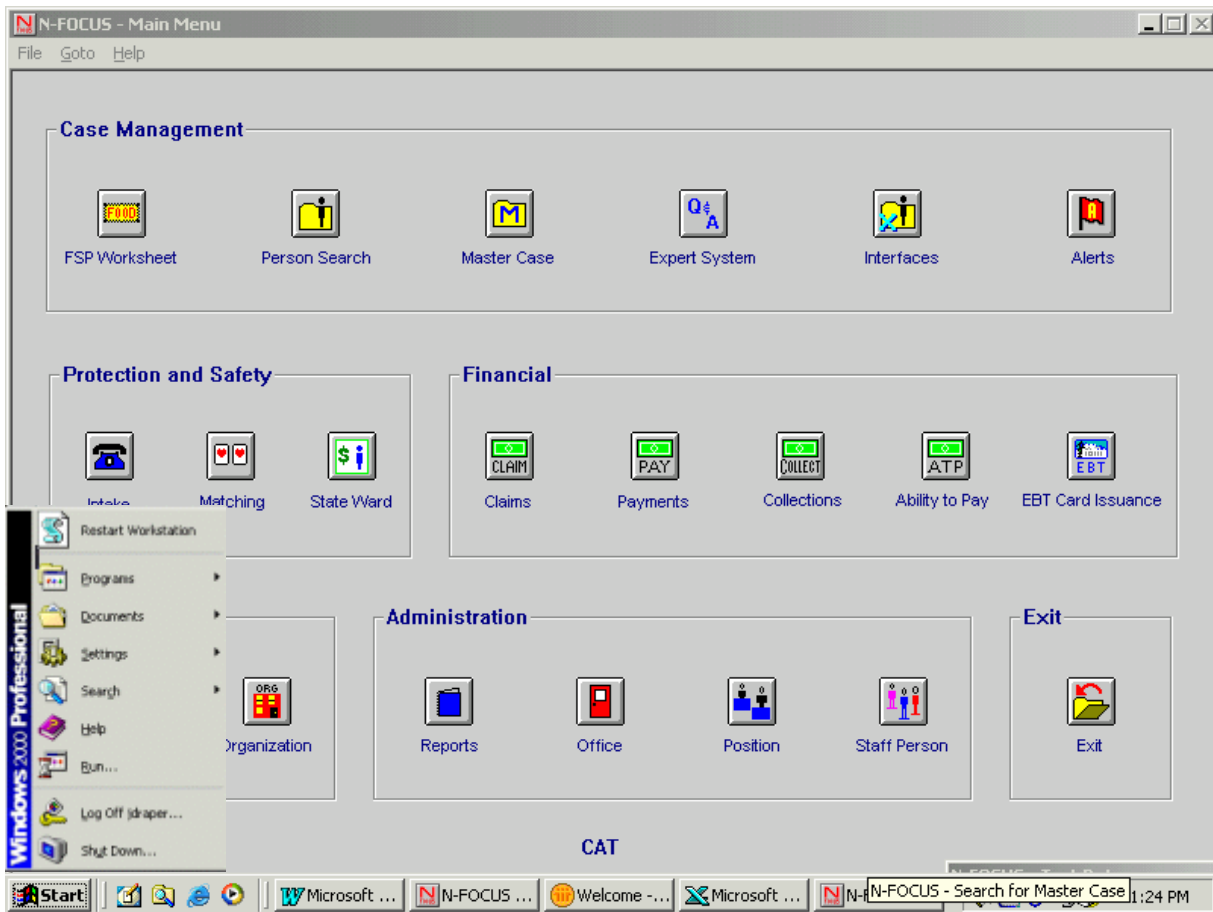
##### *TASK BAR WINDOW SELECT (NEW)*

Much of the navigation in N-FOCUS will now require you to access your task bar to select the window you want to navigate to. There are two ways to access the Windows® task bar.

1. Select the window key on your keyboard; – OR –



2. Select and hold both the Control (**Ctrl**) and Escape (**Esc**) keys on your keyboard. Doing so allows you to access the Start pop-up selection window while displaying all of the applications and N-FOCUS windows you currently have open.



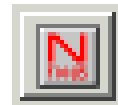
3. Position your mouse over the program icon button. Do not click, but hold the mouse over this button. A pop-up box will display identifying details about the window.

### Alt/Tab pop-up Window Option

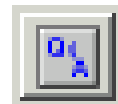
If you do not want to work with the task bar displayed, you can pull up the Alt/Tab pop-up window by doing the following. Hold down the Alt key on your keyboard (using your thumb works well), then while continuing to hold down the Alt key, press the Tab key. Select and release the Tab key on your keyboard, continuing to hold the Alt key, then select and release the Tab key again to change the active icon and description. Once the application or N-FOCUS window is selected that you want, release the Alt key and the application or N-FOCUS window will display on your screen.

Depending on whether the window is an Expert System (Navigator) window or a Mainframe window, a different icon will display.

Mainframe N-FOCUS windows are identified by the red N icon. The active icon window title will display in the text box immediately below the icons.



The N-FOCUS Case Status window (the gateway window to the Expert System) is identified by the blue Q & A icon.



The Expert System Navigator window is identified by the green compass with small red N icon.



N-FOCUS and other program windows will display horizontally at the bottom of your task bar. Select the windows key on your keyboard or select and hold the Ctrl and Esc keys to

display your task bar. Select the window key again or click the mouse somewhere on the task bar to hide the Start menu from displaying.

## NAVIGATING FROM EXPERT SYSTEM TO MAINFRAME

If you wish to view Mainframe information for the case you have open to the Expert System Navigator window, you will continue to use the Master Case icon (blue M on yellow folder) to access Mainframe information for that case.

**NOTE:** Failure to close out the Mainframe windows for your case prior to returning to the Expert System Navigator window will result in your Navigator session being locked. You will not be able to do anything (enter data, close windows, etc.). The Navigator window that is locked up will display as grayed out. The Navigator icon that is grayed out will not have a box around the Navigator compass.

*Windows 2000 task bar display of grayed out Navigator Window:*

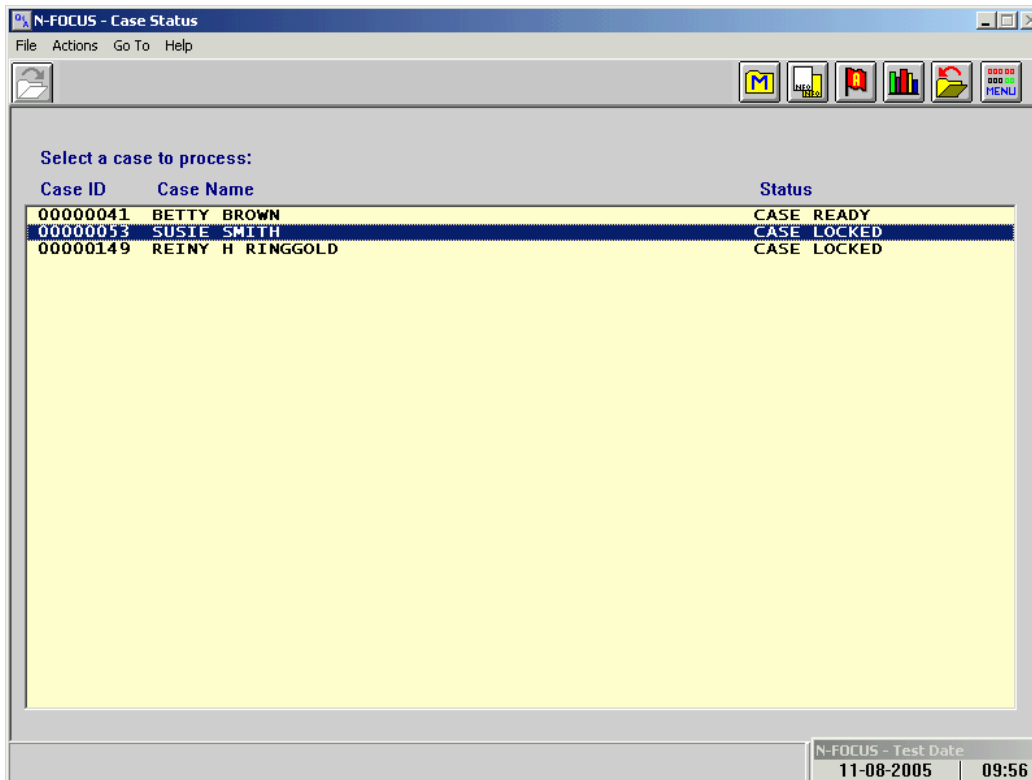


To access another case while in the Expert System Navigator window, use the Window key on your keyboard or select alt-tab to access your open program windows. Select the N-FOCUS Main Menu window and access the desired master case. **This process allows you to leave your Navigator window without actually closing out of the Expert System.**

## Case Status Window Refresh

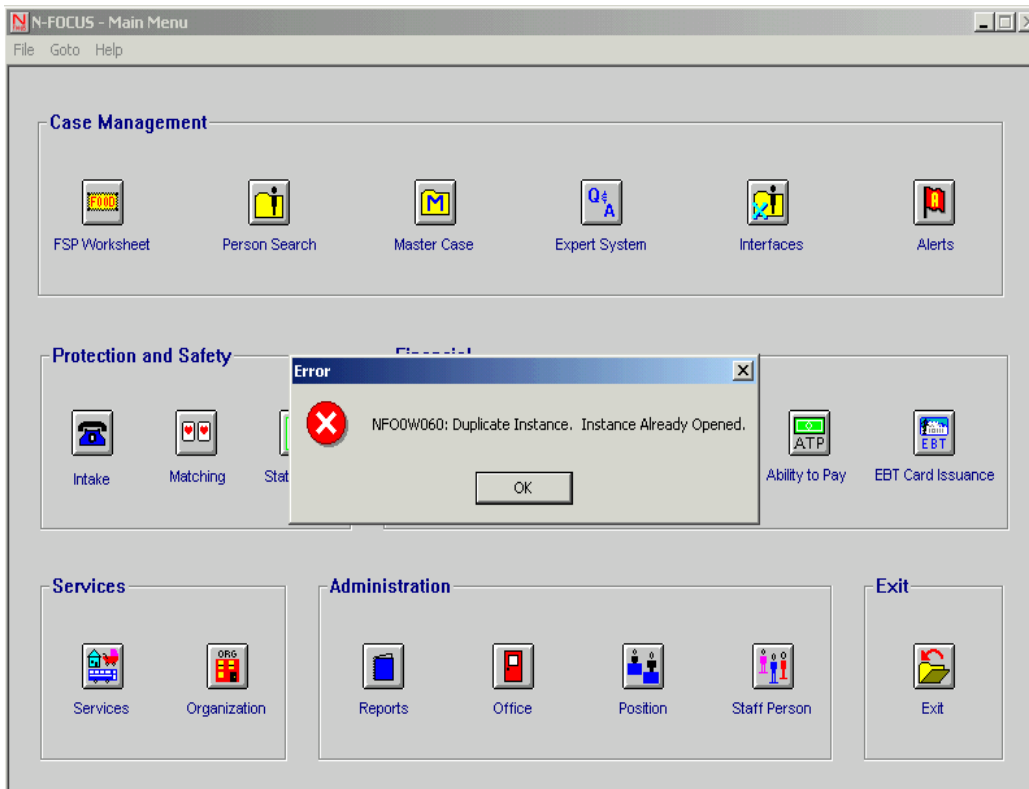
**The Case Status window does not automatically refresh.** Anytime you check out another Master Case, Close from Navigator or Check in a case, you will need to refresh the window to display the current status or remove the case that was checked in.

To refresh the Case Status window: From the Actions drop-down menu, Select "Refresh Window." You may also single-click your mouse line of Case data, or select F5.



**NOTE:** If you have already checked a case out, the Case Status window will remain open on your task bar. You will now use your Windows key, Ctl-Esc, or Alt-Tab to select the Case

Status window. If you attempt to open the Case Status window through the Q & A button on the Main Menu, you will receive the following duplicate instance error.



## ***NAVIGATING FROM MAINFRAME TO EXPERT SYSTEM***

To view an open Navigator window from the Mainframe, you will need to use the Window key on your keyboard or select alt-tab to access the Navigator window.

### **Case Check-In**

When finished with actions in the Expert System Navigator window, close the Navigator to the Case Status window. Your case will display on the Case Status window as Case Locked. One click on the case line or select Refresh Window from the Actions drop-down menu will change the status to Case Ready.

**Result:** The case status will update to Case Ready and you will be able to check-in the case.

### **Important Points to Remember**

- Case Locked means the case is open to Navigator or is in error status
- The Case Status window does not automatically refresh.
- Refresh the Case Status window to view recently checked out cases or to update the case to a ready status to check-in.
- If Navigator is locked (cannot do anything) you have a mainframe window open for that case that needs to be closed before Navigator will function.
- Use the Window key, Ctrl/Esc or Alt/Tab to move between windows.
- If you receive a Duplicate Instance message, it means you already have that window open. View your taskbar to find the window and click on it to bring it up.

## PERSON DATA

### *ADDING A PERSON TO N-FOCUS (TIP)*

**DO NOT for any reason, use the first or last name as unknown, anonymous or any other made up name.** If you do not know the first and last name of a person they are not to be added to N-FOCUS. Create narrative and put what information you know in the narrative.

**DO NOT for any reason, enter address information using terms such as unknown, anonymous or any other made up name.** If you do not know an address, leave it blank. Entering dummy addresses causes problems with our interfaces.

## PROVIDERS

### *UPDATING PROVIDER INFORMATION (TIP)*

**DO NOT UPDATE PROVIDER INFORMATION.** The assigned Resource Development worker is the only person who should be updating provider information including the rates, address, etc.

## RIGHT-CLICK ACTION PROBLEMS (TIP)

Right-click in the Mainframe and Expert System does not always perform properly. If the hourglass does not go away you can still complete the action. This is a display problem only.

## MAINFRAME TOPICS

## ALERTS

### *ADC*

#### **Vital Statistics Alerts with Automated Narrative Entry (NEW)**

When a Vital Statistics Interface alert is generated due to a verified birth, death, SSN, or marriage, a narrative will automatically be entered for ADC program cases. The narrative will be titled, "Automated Narrative Entry" and is entered for alerts numbered 240, 241, 242, or 261. No automated narrative entry will occur for Alert 262 (Marriage Lead) or 263 (Verify Death) as these are lead alerts that require further verification to confirm it is the correct person.

Prior to this release, part of the father's name on the Birth alert was sometimes cut off due to space limitations. The entire name and any additional text will appear in the automated narrative entry.

### *FSP*

#### **Worker Notification When IL Grant Begins (NEW)**

Independent Living cases are often set up in a separate master case from the FSP program case. The FSP worker will now receive an alert when an IL grant for someone in the FS budget is approved in a separate master case.



## ***IUC***

### **Alert When Benefits Start Again (NEW)**

As of 9-19-05, an alert is generated when unemployment income starts again after a period of stopping for more than 30 days within a current claim period.

### **Out Of State Employment and IUC Alerts Based On CHARTS (NEW)**

When a client is designated as a Custodial or Non-Custodial Party in an open CHARTS case and CHARTS receives a match that the person is receiving wages or unemployment from another state, an N-FOCUS alert will be created. An alert will also be created if the person is receiving wages or a pension from the Department of Defense. This information is to be considered a lead and further follow-up may be necessary to verify whether the income is continuing.

**NOTE:** Because the out of state wages alert is not large enough to display all necessary employer information, an automated narrative entry will be entered on the master case. This information will include the employer address and other pertinent information to send for verification.

## ***NEW HIRE***

### **Alert Expanded Information (NEW)**

Prior to this release, the New Hire Alert displayed only one program case. The alert will now display all the program cases in which the person has a status of either Active, Pending, Spenddown, or Premium Due.

## ***SEW***

### **Multiple Alerts For The Same Employer (FIX)**

Previously, when an employer submitted more than one quarter of wages on the same day for the same person, multiple SEW alerts were created. With this release, only one SEW alert with the most recent quarter information will display. If other quarters of information are needed, this is still available on the interface window.

## **HELP**

### ***UPDATED AND EXPANDED "HOW DO I" SECTION (NEW)***

The "How Do I" section of Help (listed under How to...on the Help drop-down menu) has been updated and expanded with new information.

## **LOTUS NOTES**

### ***MAIL NOTIFICATION OF LOTUS NOTES (TIP)***

Visual mail notification may cause problems within N-FOCUS. It is best to not set your mail notification to Visual.

## **NARRATIVE**

### ***AUTOMATED NARRATIVE ENTRY (NEW)***

A new subject of "Automated Narrative Entry" has been added. This narrative will be inquiry only. See "Alerts" topic previously in this section to see which alerts will create the automatic entry.

## N-FOCUS AVAILABILITY

### ***N-FOCUS SUNDAY AVAILABILITY (NEW)***

The N-FOCUS system will now be available on Sundays from 6:00 AM to 5:00 PM.

## SERVICE AUTHORIZATION

### ***SERVICE AUTHORIZATION FOR CHILD CARE SCHEDULE (TIP)***

There is a problem with the Child Care schedule when hours selected cross over to the next day. N-FOCUS does not correctly calculate the units balance. The Service Authorization window looks correct, however behind the scenes the number is a negative value. This stops claims from being paid.

Until this is fixed, in these instances, do not use the Child Care schedule. Manually calculate the number of units needed.

Example: Client works the third shift from 11:00 PM to 7:00 AM. In the CC schedule the worker enters begin time of 11:00 PM and end time of 7:00 AM. N-FOCUS miscalculates the number of remaining units to a negative number rather than a positive number. When claims are submitted, N-FOCUS runs against the balance and since it is a negative number, the claim is put into postpone status.

## STATE WARD TRUST FUND ACCOUNTS (NEW)

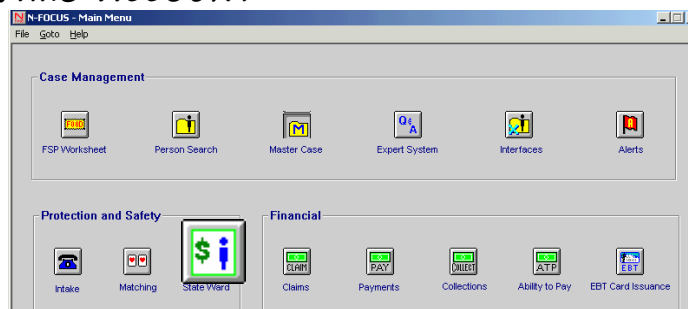
State ward trust fund accounts will be located in N-FOCUS with the November 14, 2005, release. This affects state wards who have trust fund accounts managed by the Financial Responsibility office in Lincoln or who have trust fund accounts managed by the YRTC business managers in Geneva and Kearney. For the purposes of this discussion, "Financial Responsibility" refers to these state ward trust fund account managers. "Ward" refers to any youth that has a state ward trust fund account, including YRTC youth.

While the State Ward Account buttons and windows will be visible in N-FOCUS beginning November 14, state ward trust fund deposits and disbursements will not actually begin in N-FOCUS until approximately Jan. 1, 2006. In the interim, the state ward trust fund account managers will create the ward accounts in N-FOCUS and will establish and verify the ending account balances in the previous AIMS system and establish the beginning account balances in N-FOCUS.

Workers assigned to the ward will be able to view the ward's trust fund account(s) in N-FOCUS. Workers who currently use the 0866 form to mail or fax personal needs fund requests to Nancy Gusler will continue to do so. After January 1, 2006, workers who submit personal needs requests (0866 forms) will need to view the ward's account and use the Personal Assets Available Balance amount in N-FOCUS to determine whether funds are available (explanation and example follow).

### ***SEARCHING FOR A WARD ACCOUNT***

On the N-FOCUS main menu, click on the State Ward icon in the Protection and Safety group box.



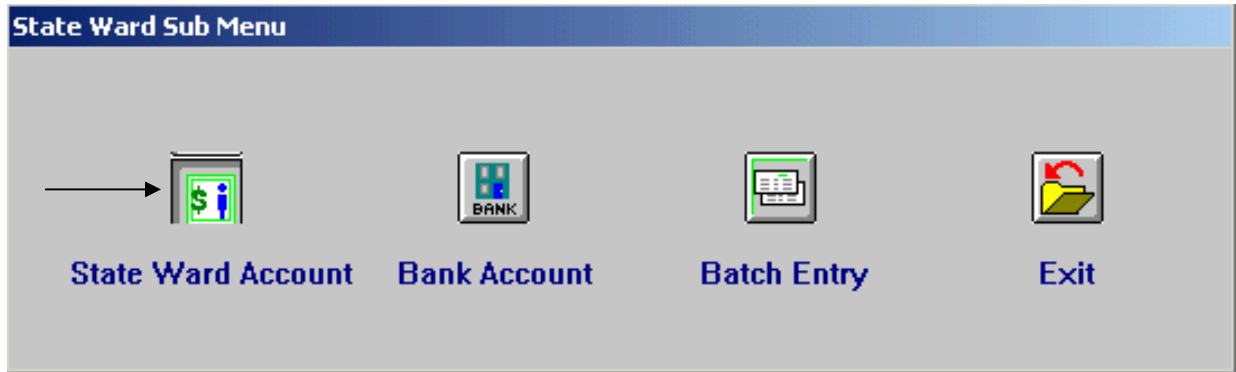
**Result:** The State Ward sub menu displays with the following icons:

**State Ward Account** – Access to individual state ward trust fund Accounts (Inquiry only for workers assigned to wards). Financial Responsibility staff will use these windows to create and manage trust fund accounts.

**Bank Account** – Security is limited to designated Financial Responsibility staff.

**Batch Entry** – Security is limited to designated Financial Responsibility staff.

**Exit** – Return to the main menu.



Click on the State Ward Account icon.

**Result:** The Search Trust Fund Account window displays.

## Search options

### 1. Account Number

1.1 Type the account number in the Number field, then click on the Search button.

Number

Account

**Result:** The Detail Trust Fund Account window displays in Inquiry mode.

N-FOCUS - Detail Trust Fund Account

File Actions Detail Goto Help

Person

Name SYLVIA PARKER  
SSN 789-44-1010  
Birthdate 05-15-1990 Legal Status HHS Ward

INQUIRY

Balances  
Current \$813.00  
Available \$813.00

Account

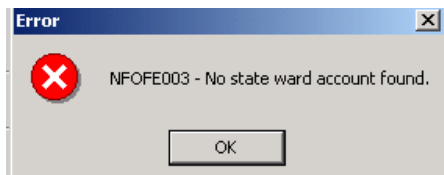
Number 1145 Status Open Status Date 10-18-2005  
Bank Account LINCOLN GUARDIANSHIP  
Type Guardianship  
Comments

Personal Assets  
Total Accumulated \$1,000.00  
Balance \$0.00  
Available \$0.00  
Excess Available \$813.00

Account Transactions

Date	Description	Debit	Credit	Balance	Payee
10-19-2005	FC - 4E/CFS	\$450.00		\$813.00	STATE OF NEBRASKA
10-19-2005	SSI		\$950.00	\$1,263.00	
10-19-2005	EDUCATION	\$700.00		\$313.00	BEST SCHOOL
10-19-2005	FC - 4E/CFS	\$300.00		\$1,013.00	STATE OF NEBRASKA
10-19-2005	EDUCATION	\$250.00		\$1,313.00	BEST SCHOOL
10-19-2005	FC - 4E/SA	\$300.00		\$1,563.00	STATE OF NEBRASKA
10-19-2005	SSI		\$950.00	\$1,863.00	
10-19-2005	PAYROLL		\$13.00	\$913.00	
10-19-2005	CLOTHING	\$50.00		\$900.00	FLEECES, LYNDY
10-18-2005	BALANCE FORWARD		\$950.00	\$950.00	

1.2 If no accounts match the search criteria, an error message displays.



### 2. Ward Name/SSN

2.1 Click on the Ward outselect arrow.

N-FOCUS - Search Trust Fund Account

Account

Number

- OR -

Ward

Name

SSN

☒ All Locations

Type [ALL]

**Result:** The Person Search window displays.

2.2 Search for the ward.

- 2.2.1 If only one ward meets the search criteria, the Search Trust Fund Account window displays the ward name and SSN.  
(If more than one ward meets the search criteria, select the desired ward from the list and click on the blue return arrow. The Ward SSN and name display on the Search Trust Fund Account window.)

- 2.3 Click on the desired account Type option (defaults to ALL).  
For workers who submit ward personal needs requests, select Guardianship from the drop-down list.
- 2.4 Click on the desired Status options (defaults to ALL). For workers who submit ward personal needs requests, select Open from the drop-down list.
- 2.5 Click on the Search button.

- 2.5.1 If only one account matches the search criteria, the Detail Trust Fund Account window displays in Inquiry mode.

**N-FOCUS - Detail Trust Fund Account**

File Actions Detail Goto Help

**Person**

**Name** SYLVIA PARKER

**SSN** 789-44-1010

**Birthdate** 05-15-1990 **Legal Status** HHS Ward

**Account**

**Number** 1145 **Status** Open **Status Date** 10-18-2005

**Bank Account** LINCOLN GUARDIANSHIP

**Type** Guardianship

**Balances**

**Current** \$813.00

**Available** \$813.00

**Personal Assets**

**Total Accumulated** \$1,000.00

**Balance** \$0.00

**Available** \$0.00

- 2.5.2 If more than one account matches the search criteria, the List Trust Fund Accounts window displays. Double-click on the desired account to display the Detail Trust Fund Account window in Inquiry mode. (For workers who submit personal needs requests, choose the Lincoln Guardianship account.)

**N-FOCUS - List Trust Fund Account**

File Actions View Goto Help

Acct	Last Name	First Name	SSN	Account Type	Status	Available	Balance	Bank Account
1147	PARKER	SYLVIA	789-44-1010	Guardianship	Open	\$0.00	\$25.78	GENEVA GUARDIANSHIP
1145	PARKER	SYLVIA	789-44-1010	Guardianship	Open	\$900.00	\$950.00	LINCOLN GUARDIANSHIP
1146	PARKER	SYLVIA	789-44-1010	Dedicated	Open	\$3,000.00	\$3,000.00	LINCOLN DEDICATED

Scroll to the right to view more information.

**N-FOCUS - List Trust Fund Account**

File Actions View Goto Help

SSN	Account Type	Status	Available	Balance	Bank Account	Birthdate
789-44-1010	Guardianship	Open	\$0.00	\$25.78	GENEVA GUARDIANSHIP	05-15-1990
789-44-1010	Guardianship	Open	\$900.00	\$950.00	LINCOLN GUARDIANSHIP	05-15-1990
789-44-1010	Dedicated	Open	\$3,000.00	\$3,000.00	LINCOLN DEDICATED	05-15-1990

- 2.5.3 If no accounts match the search criteria, an error message displays.



**DETAIL TRUST FUND ACCOUNT WINDOW - INQUIRY**

The Detail Trust Fund Account window is a view-only window for workers.

**Fields**

**Person box** – Displays ward information.

**Account box** – Displays trust fund account number, status and status date. Also displays the commercial bank account that holds the funds for this account, the account type and associated comments.

**Account Transactions box** – Displays account activity. Every transaction that affects the account balance will display a row. Scroll to the right to see Comments (if any) for each transaction.

**Note<sup>1</sup>:** When a debit row is highlighted and the payee is a person, the Person Detail button is enabled. When a debit row is highlighted and the payee is an organization, the Org button is enabled. Click on the appropriate button to view payee information.

**Note<sup>2</sup>:** Double-clicking a transaction row displays the Detail Transaction window.

Date	Description	Debit	Credit	Balance	Payee
10-19-2005	FC - 4E/CFS	\$450.00		\$813.00	STATE OF NEBRASKA
10-19-2005	SSI		\$950.00	\$1,263.00	
10-19-2005	EDUCATION	\$700.00		\$313.00	BEST SCHOOL
10-19-2005	FC - 4E/CFS	\$300.00		\$1,013.00	STATE OF NEBRASKA
10-19-2005	EDUCATION	\$250.00		\$1,313.00	BEST SCHOOL
10-19-2005	FC - 4E/SA	\$300.00		\$1,563.00	STATE OF NEBRASKA
10-19-2005	SSI		\$950.00	\$1,863.00	
10-19-2005	PAYROLL		\$13.00	\$913.00	
10-19-2005	CLOTHING	\$50.00		\$900.00	FLEECES, LYNDY
10-18-2005	BALANCE FORWARD		\$950.00	\$950.00	

Scroll to the right to view more data

Credit	Balance	Payee	Reference #	Comments
	\$813.00	STATE OF NEBRASKA	00000625	
\$950.00	\$1,263.00		50522449	
	\$313.00	BEST SCHOOL	00000624	COMPUTER
	\$1,013.00	STATE OF NEBRASKA	00000623	
	\$1,313.00	BEST SCHOOL	00000622	TUITION
	\$1,563.00	STATE OF NEBRASKA	00000621	
\$950.00	\$1,863.00		89014513	
\$13.00	\$913.00		61159658	
	\$900.00	FLEECES, LYNDY	00000620	BASKETBALL SHOES
\$950.00	\$950.00			AIMS ENDING BALANCE

**Balances box** – Displays the account Current and Available balances.

- Current balance equals the account balance before any pending debit transactions are posted.
- Available balance equals the current balance minus pending debit transactions.

**Personal Assets box** – Used only for Guardianship accounts that contain Personal Asset balances (Lincoln Financial Responsibility accounts only). By statute, a ward is entitled to the first \$1,000 of accumulated funds per wardship for personal needs. In N-FOCUS, this is known as Personal Assets. This means that a ward can spend up to \$1,000 of accumulated funds for personal needs requested through the 0866 process. After the ward accumulates

the first \$1,000, any funds in excess of the first \$1,000 are available to the state to use for reimbursement of costs (i.e., to reimburse for foster care paid by the state). The exception is that interest can accrue on the Personal Assets after the \$1,000 Personal Assets requirement is met.

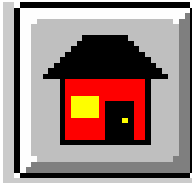
- Total Accumulated – Displays the accrual of the first \$1,000. Once a ward has accrued the first \$1,000, this amount remains at \$1,000 to indicate that the ward has done so. If interest accrues, it will be added to this \$1,000.
- Balance – Displays the Personal Assets Total Accumulated balance minus any Personal Asset funds the ward has spent.
- Available – Displays the Personal Assets Balance minus any pending Personal Asset fund debit requests. **For workers who submit 0866 personal needs request forms, Personal Assets Available is the ONLY balance that matters. If Personal Asset Available funds exist, the worker on behalf of the ward may request funds up to the Personal Asset Available amount.**
- Excess Available – Displays the amount in excess of Personal Assets that is available for the state to use for reimbursement of costs. This is calculated as the account Available Balance minus the Personal Assets Available Balance.

## Other window features

**Master Case icon** – Takes user to ward's master case.

**Person Detail icon** – Takes user to ward's Person Detail.

**Placement Details icon** – View-only display of ward's current placement address/dates.



N-FOCUS - Placement Details

**Placement**

**Name** FLEECES, LYNDY

**Begin Date** 01-01-2005      **End Date** 12-31-9999

**Placement Address**

**Line 1** PO BOX 95026

**Line 2** 4TH FLR N-FOCUS SYSTEM TEST

**City** LINCOLN

**State** NE      **Zip** 68509 - 5026

OK



**Actions menu, View Monthly Maintenance** – View-only display of the monthly maintenance history.

**N-FOCUS - Detail Trust Fund Account**

Actions Detail Goto Help

Change Account Status...

Create Transaction...

**View/Update Monthly Maintenance**

Delete Account

Print Account History

**N-FOCUS - Change Monthly Maintenance**

**State Ward**

Name SYLVIA PARKER

Account Number 1145

**Monthly Maintenance History**

Status	Begin Date	End Date
NO	10-18-2005	

**Monthly Maintenance**

**Monthly Maintenance**

☐ No

☒ Yes

**Effective Date**

OK Cancel

**Actions menu, Print Account History** – Display/print the account transaction history (account statement).

**N-FOCUS - Detail Trust Fund Account**

Actions Detail Goto Help

Change Account Status...

Create Transaction...

**View/Update Monthly Maintenance**

Delete Account

**Print Account History**

**N-FOCUS - State Ward Trust Fund Accounts: Guardianship Account History**

Main Report

State Ward Trust Fund Accounts  
Guardianship Account History

Account: 1145 Page 1 of 1

Account Information:

Ward Name: SYLVIA PARKER Current Balance: \$ 81300

SSN: 789-44-1010 Available Balance: \$ 81300

Birth Date: 05-15-1990 Personal Assets: \$ 0.00

Status: Open Personal Available: \$ 0.00

Transactions

Date	Description	Debit	Credit	Balance	Payee	Reference Number	Comments
10-19-2005	FC - 4E/CFS	450.00		813.00	STATE OF NEBRASKA	00000505	
10-19-2005	SSI		950.00	1,263.00		50522440	
10-19-2005	Education	700.00		313.00	BEST SCHOOL	00000624	COMPUTER
10-19-2005	FC - 4E/CFS	300.00		1,013.00	STATE OF NEBRASKA	00000623	
10-19-2005	Education	250.00		1,313.00	BEST SCHOOL	00000622	TUITION
10-19-2005	FC - 4E/CFS	300.00		1,563.00	STATE OF NEBRASKA	00000621	
10-19-2005	SSI		950.00	1,863.00		89014613	
10-19-2005	Payroll		13.00	913.00		61150606	
10-19-2005	Clothing	50.00		900.00	FLEECS, LYNDY	00000620	BASKETBALL SHOES
10-19-2005	Balance Forward		950.00	950.00			AIMS ENDING BALANCE

**Details menu, Account History** – View-only display of the history of account status changes.

**N-FOCUS - Detail Trust Fund Account**

File Actions Detail Goto Help

**Detail Trust Fund Account**

Detail Goto Help

**Account History**

**N-FOCUS - Trust Fund Account History**

**Person**

Name SYLVIA PARKER

SSN 789-44-1010 Birthdate 05-15-1990

**Account History**

Begin Date	End Date	Entry Time	Status	Comments
10-18-2005		11:31 AM	Open	

OK

**Account Transactions Box**

**Organization button** – Takes user to payee organization for selected transaction row.

**Person Detail button** – Takes user to payee person for selected transaction row.

**N-FOCUS - Detail Trust Fund Account**

File Actions Detail Goto Help

Person

**Name** SYLVIA PARKER  
**SSN** 789-44-1010  
**Birthdate** 05-15-1990 **Legal Status** HHS Ward

**Account**

**Number** 1145 **Status** Open **Status Date** 10-18-2005  
**Bank Account** LINCOLN GUARDIANSHIP  
**Type** Guardianship  
**Comments**

**INQUIRY**

**Balances**

Current	\$813.00
Available	\$813.00

**Personal Assets**

Total Accumulated	\$1,000.00
Balance	\$0.00
Available	\$0.00
Excess Available	\$813.00

**Account Transactions**

Date	Description	Debit	Credit	Balance	Payee
10-19-2005	FC - 4E/CFS	\$450.00		\$813.00	STATE OF NEBRASKA
10-19-2005	SSI		\$950.00	\$1,263.00	
10-19-2005	EDUCATION	\$700.00		\$313.00	BEST SCHOOL
10-19-2005	FC - 4E/CFS	\$300.00		\$1,013.00	STATE OF NEBRASKA
10-19-2005	EDUCATION	\$250.00		\$1,313.00	BEST SCHOOL
10-19-2005	FC - 4E/SA	\$300.00		\$1,563.00	STATE OF NEBRASKA
10-19-2005	SSI		\$950.00	\$1,863.00	
10-19-2005	PAYROLL		\$13.00	\$913.00	
10-19-2005	CLOTHING	\$50.00		\$900.00	FLEECES, LYNDY
10-18-2005	BALANCE FORWARD		\$950.00	\$950.00	

ORG

**ACCOUNT/PERSONAL ASSET BALANCE CHANGES EXAMPLE**

**How Account and Personal Asset Balances Change as Transactions are Processed**  
 (Illustration for Sylvia Parker account shown in previous screen prints.)

Transaction		Account		Personal Assets			Excess Available	Comments
Description	Amount	Balance	Available	Accumulated Amount	Balance	Available		
Balance Forward	\$950	\$950	\$950	\$950	\$950	\$950	\$0	Beginning balance in N-FOCUS (ending balance in AIMS)
Clothing (personal)	(\$50)	\$950	\$900	\$950	\$950	\$900	\$0	Not yet posted: Available = Balance minus \$50
Clothing (personal – posted)		\$900	\$900	\$950	\$900	\$900	\$0	Posted: Balance = Available Balance
Payroll	\$13	\$913	\$913	\$963	\$913	\$913	\$0	Increases all balances
SSI	\$950	\$1,863	\$1,863	\$1,000	\$950	\$950	\$913	Ward has reached \$1,000 Personal Asset accumulation. No future deposits (except interest) will count toward PA.
Foster care reimburse	(\$300)	\$1,563	\$1,563	\$1,000	\$950	\$950	\$613	Not a PA expense, so doesn't reduce PA balances
Education (personal)	(\$250)	\$1,563	\$1,313	\$1,000	\$950	\$700	\$613	Not yet posted: Available = Balance minus \$250
Education (personal – posted)		\$1,313	\$1,313	\$1,000	\$700	\$700	\$613	Posted: Balance = Available Balance
Foster care reimburse	(\$300)	\$1,013	\$1,013	\$1,000	\$700	\$700	\$313	Not a PA expense, so doesn't reduce PA balances
Computer (personal needs)	(\$700)	\$1,013	\$313	\$1,000	\$700	\$0	\$313	Not yet posted: Available = Balance minus \$700. Worker should use PA Available amount to determine amount of request.
Computer (personal needs – posted)	(\$700)	\$313	\$313	\$1,000	\$0	\$0	\$313	Ward has spent all of accumulated Personal Assets. No more PA expenditures are allowed.
SSI	\$950	\$1,263	\$1,263	\$1,000	\$0	\$0	\$1,263	Increases account balances but not PA balances
Foster care reimburse	(\$450)	\$813	\$813	\$1,000	\$0	\$0	\$813	Reduces account balances but not PA balances

**NEW BUTTON ON PERSON DETAIL WINDOW**

On the Person Detail window, a State Ward Details button has been created for the use of Financial Responsibility staff in managing state ward trust fund accounts. Only Financial Responsibility staff will enter/update data on the State Ward Details button.

## Protection and Safety Programs

### COMMON APS/CWIS TOPICS

#### INTAKE

##### ***ORG RELATED PERSON (TIP)***

If you need to add more than one person as a related person to an ORG through Intake, add them all at the same time, then save. Sometimes, adding and saving one at a time, results in saving only the first person you entered. If you experience this problem, close the Org window, then go back in and add the person again.

**Remember: Do not add a person using "unknown" or some other phony data in one of the name fields.**

### ADULT PROTECTIVE SERVICE TOPICS

#### INTAKE CALLER/REPORTER SOURCE ITEMS (NEW)

Five new values have been added to the pick list of Caller/Reporter Source. They are:

- Medicaid Waiver Contract Employee/A & D
- Medicaid Waiver Contract Employee/TBI
- Medicaid Waiver Contract Employee/EI
- Medicaid Waiver Contract Employee/DD
- Developmental Disability Programs Provider

The last four entries on the list above are at the very bottom of the pick list.

Medicaid Waiver Contract Employee/A&D displays a little earlier on the list. At some time in the future, we may attempt to create a more user-friendly display order. For the time being, it may be a good idea to become accustomed to using the method of clicking repeatedly the first letter of the Source you want to select. It may be easier than scrolling to the bottom of the list each time.

**NOTE:** There are now two separate listings for DD: DD Programs Staff and the new one, DD Programs Provider.

N-FOCUS - Caller/Reporter Information

Name

Source

- Postal or Utility Company Employee
- Financial Institution Employee
- Private Care Giver
- Co-Resident
- Medicaid Waiver Contract Employee/TBI
- Medicaid Waiver Contract Employee/EI
- Medicaid Waiver Contract Employee/DD
- Developmental Disab Programs Provider

Remove Caller/Reporter

OK Cancel

##### ***TIE INTAKE TO APS PROGRAM CASE***

Tie any existing APS Program Case to any Adult Protective Services type intake or enter a new APS Program Case if none exists on the system. The APS Program Case is required in the event of a required investigation. Therefore, if you have entered an allegation finding of Court or Department Substantiated, Referred for Legal Action or UNFOUNDED, be certain you tie the Intake to the APS Program Case.

**APS PROGRAM CASE****Update APS Participant Assistance Code (TIP)**

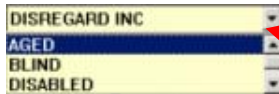
Each APS Program Person requires a Social Services Block Grant Assistance Code. You initially set this up when you add a new program case. If you reopen an existing APS Program Case or need to update the assistance code once you have gathered more than the initial information, use the following steps.

1. On the Detail Program Case window, highlight the APS program participant (if more than one exists) whose Assistance code you need to update.

2. Select the Program Person push button.

**Result:** The Program Person Information window displays.

3. Select the down arrow in the Assistance field and highlight your new selection.



4. Select the OK button.

**Result:** The Date Change becomes Effective pop-up window displays.

5. Enter the appropriate date.

6. Select the OK button.

**Result:** You return to the Detail Program Case window.

**Note:** The Assistance Code value you set when you first entered the program case remains displayed on the Detail Program Case window Program Information group box. The participant change is displayed only on the Program Person Information window.

## CWIS SPECIFIC TOPICS

### ORGANIZATION

#### *ORG/LICENSE*

##### **Update Potential Available Slots When License Activated (FIX)**

When a foster case license is updated from pending to active, the system will now accurately calculate the number of potentially available slots for out of home placements.

#### *PROVIDER MATCHING PRINT (FIX)*

The duplicate Organizations will no longer print on the Provider Matching List.

### CWIS ALERTS

#### *CASE PLAN EXPIRES NOTIFICATION (NEW)*

An alert will now display when a case plan is expiring within the next two weeks. The alert will be a reminder to review and update case plan.

#### *PERMANENCY HEARING NOTIFICATION (CHANGE)*

A Permanency Hearing is required after 12 months. The Permanency Hearing due alert was displayed too late to provide sufficient time to schedule the hearing within the appropriate time frames. The alert will now display two months prior to the hearing due date (10 months following the initial placement date). This alert will now run monthly instead of weekly so you will receive alerts on the same day for all children who need to have hearings scheduled in two months.

### INTAKE

#### *WORKSHEET (FIX)*

The Relationship Summary was printing multiple times on the Intake Worksheet. This has been fixed.

## CWIS EXPERT SYSTEM FUNCTIONALITY

### ADOPTION CASES

#### *AUTOMATED IV-E ADOPTION ASSISTANCE ELIGIBILITY (NEW)*

The federal government has mandated that when adoption cases are added to N-FOCUS, the determination of funding source should automatically be set by the system. A new task entitled "Adoption" has been added to the Expert System. After the adoption case has been added on N-FOCUS, the Expert System Adoption task will need to be processed in order to set the appropriate funding code (IV-E or Child Welfare). For those children who have had demographic data changes that need to be hidden or masked, these actions will need to be taken prior to processing the Adoption task. **NOTE:** While it may be appropriate to have several children in one master case, each child should be registered in his/her own separate Adoption program case.

## HHS Adoption Cases

1. Once you have added the Adoption case in the Mainframe and masked the identifying information if needed, check the case out and open the Adoption window found under the new CWIS task.

**Result:** Each case and child will be listed on the window with a status of pending.

2. Highlight the pending case and select the "Determine Eligibility" button at the bottom of the page.

**Result:** Subsidized Adoption – Eligibility Determination window displays.

The screenshot shows the NFOCUS - Navigator window with the title 'KAYLEE HANKS 91'. The left sidebar contains a tree view with categories like Data Collection, Non Financial, Family Relationships, Health Check, Immigration, Living Arrangement, Medical Impairment, Medicare, Work Registration, Financial Verifications, Case Maintenance, Eligibility, Summaries, Utilities, and CWIS. Under CWIS, 'Adoption' is selected. The main pane displays a table of adoption cases:

PROGRAM	PC NUMBER	STATUS	Begin Date	Fund Code
SA/MED	72659874	Pending	01-01-2005	
HANKS			10-2000	4
SA/MED	6331877	Pending	01-01-2005	
HANKS			05-1994	10
SA/MED	66357838	Pending	01-01-2005	
HANKS			10-1987	17

At the bottom of the window, there are buttons for 'Determine Eligibility', 'Eligibility Details', and 'Help'. The 'Determine Eligibility' button is highlighted with an arrow from the instruction text.

3. Highlight the pending program case person.

**Result:** The appropriate tab (either HHS Adoption or Private Adoption) for the specific case situation will enable.

**NOTE:** When the adopted child is added as a new person on N-FOCUS, you must discontinue the child that was in the CFS case and tie it to the new person. This action allows N-FOCUS to determine that the case is a HHS adoption rather than a Private Adoption.

The screenshot shows the 'Subsidized Adoption - Eligibility Determination' window. At the top, it displays 'Program Case' with the following details: HANKS KAYLEE, 10-2000, SA/MED, 72659874, 01-01-2005, Pending. Below this, there are two tabs: 'HHS Adoption' and 'Private Adoption'. The 'HHS Adoption' tab is selected and highlighted with an arrow from the instruction text. The content area of the 'HHS Adoption' tab contains the following questions:

Adoption

Is this a re-adoption?

☒ Yes ☐ No

Was the previous adoption IV-E funded?

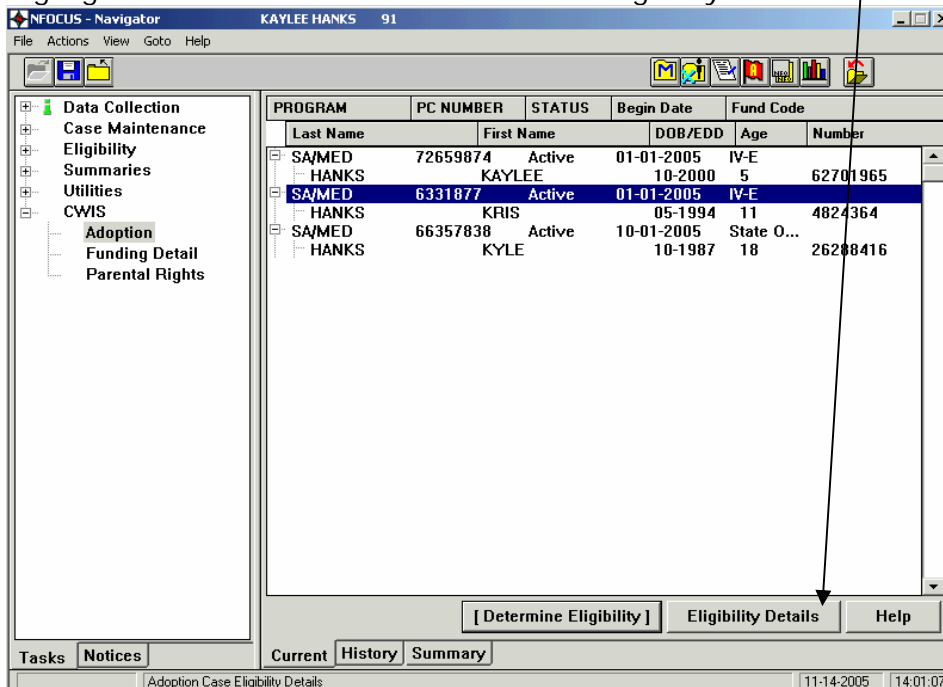
☐ Yes ☐ No

At the bottom of the window, there are buttons for 'Next', 'OK', 'Cancel', and 'Help'.

4. Answer the first question in the HHS Adoption box by selecting either the Yes or No radio button. Depending on the answer, the second question will remain enabled to answer or become grayed out, as the answer is not applicable to the situation at that point. Select the OK button to Exit back to the Navigator window.

**Result:** The case will now show active with the appropriate fund code.

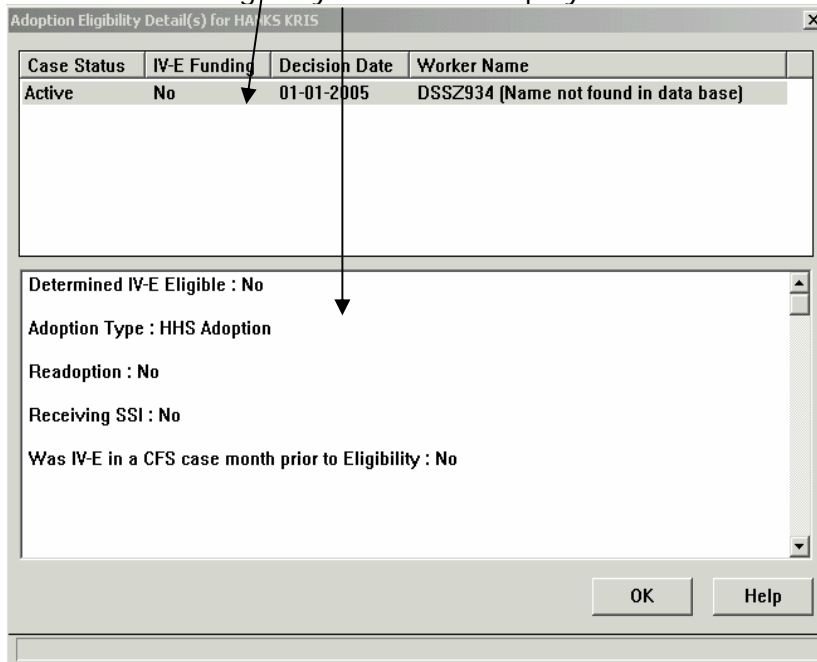
- Highlight the active case line and select the Eligibility Details button.



**Result:** The Adoption Eligibility Details window for the specific person will display.

- Highlight the active case line.

**Result:** The eligibility details will display.



## Private Adoption Cases

Private adoption cases are rare, but the IV-E eligibility determination in the Expert System is processed similar to HHS Adoption cases.

- From the Subsidized Adoption Eligibility Determination window, highlight the program case line for the adopted child.

**Result:** Because N-FOCUS will not find an associated CFS case, the Private Adoption tab will enable.



**Subsidized Adoption - Eligibility Determination**

**Program Case**

YEARSAGO TRISHA	10-1995	SA/MED	71419111	11-01-2005	Pending
-----------------	---------	--------	----------	------------	---------

**HHS Adoption** **Private Adoption**

**Adoption**

Is this a re-adoption?  
☐ Yes ☒ No

Was the previous adoption IV-E funded?  
☐ Yes ☐ No

Has the child been determined SSI eligible?  
☐ Yes ☒ No

Is the child in the custody of Private or Non-Private agency?  
☒ Yes ☐ No

Is the child eligible/receiving ADC grant according to 1996 standards?  
☒ Yes ☐ No

**Placement**

Child placed in FC - Has the court determined it is CTW to remain in the home?  
☒ Yes ☐ No

Vol plcm or Relinq - Has the court determined it is CTW within 6 months of removal from the home?  
☐ Yes ☐ No

Next OK Cancel Help

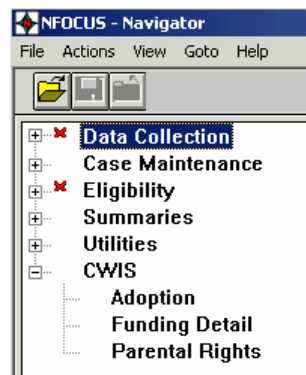
- Answer the first question in the Private Adoption box by highlighting either the Yes or No radio button. Depending on the answer, the second question will remain enabled to answer or become grayed out, as the answer is not applicable to the situation at that point. Continue with all enabled questions. Select the OK button to exit and return to the Navigator window.

When the adopted child turns 18, it will be necessary to review the adoption eligibility.

## NAVIGATOR

### ***CWIS TREE LIST TASKS (NEW)***

The Child Protection and Safety functions of Adoption, Funding Detail, and Parental Rights in the Expert System have been grouped together under the task of CWIS. The CWIS task is located immediately following the Utilities task on the Tree List.



### **Funding Detail Task (FIX)**

Funding Detail has been fixed so that IV-E gets sets correctly for the Yearly Reviews.

# Expert System

## MULTIPLE EXPERT SYSTEM SESSIONS (NEW)

At the request of the N-FOCUS User Group, it is now possible to have a case checked out in the Expert System and navigate back to the mainframe to view another case without closing your case from the Expert System. This functionality will allow you to have more than one case checked out and opened to the Expert System Navigator window. Regardless of whether you choose to use this functionality, there are some differences to basic N-FOCUS navigation in the Expert System.

### CASE STATUS WINDOW

#### Opening a Case to Expert System

Checking out a case is the same. There are only two statuses that will appear on the Case Status window: Case Ready and Case Locked.

- Case Ready – can be opened to navigator or checked in.
- Case Locked – navigator is open or navigator has been closed due to an error. If the navigator has been closed due to an error, you must call N-FOCUS Production support. From the Case Status window, double-click on the case, use the Open icon or select Open from the File drop-down menu.

**Result:** The case status will update to Case Locked and the case will open to the Navigator window.

**Note:** The hourglass no longer stays but it still takes a few minutes to open. Once navigator opens the navigator window will take focus.

Case ID	Case Name	Status
00000002	MARGUARITA MOUSE	CASE READY
00000005	MOLLY WEASLEY	CASE LOCKED
00000016	JOHN MOORE	CASE READY
00000038	TINA YODERS	CASE READY
00000050	HAPPY HARRY	CASE READY
00000100	JASON VARITEK	CASE READY
00000184	SALLY WHEN	CASE READY

**NOTE:** When a case is open, the case will display on the Case Status window as Case Locked.

## BUDGET AUTHORIZATION

### *OVERPAYMENT WINDOW ENHANCED (CHANGE)*

The overpayment window for any Expert System program case has been redesigned so that all information in the list box is now visible.

**Overpayment** 9-2005

This is an overpayment budget. Do you want to continue and create an \$360.00 overpayment for FSP? ☒ Yes ☐ No

**Responsible Person:**

BROWN	BARRY	03-03-1944
BROWN	BLAH	11-22-1944
BROWN	BILLIE	06-06-1999

**Type of Overpayment:**

Administrative [FSP]
Household Error [FSP]

**Reason for Overpayment:**

Worker Failed to Inform Client of Responsibility to Cooperate with Child Support

**Overpayment Identified by:** HHSS Staff

**Date of Discovery:** 11-14-2005

OK Cancel Help

### *PREVIOUSLY AUTHORIZED BUDGET DISPLAY REOPEN/RECERT (FIX)*

The previously authorized budget will now display on the lower portion of the Budget Authorization window for FSP, AABD, ADC, Medicaid, FW and IL programs when the case is reopened or recertified if the case was closed within the last 18 months.

### *REVIEW ADDED TO BUDGET AUTHORIZATION WINDOW (NEW)*

It will now be possible to update the Review date for PA programs from the budget authorization window. After authorizing the budget highlight the Program Case and the Review button will be enabled.

1. Highlight the Program Case you have reviewed.
2. Select the Review button.

**Budget Authorization** Benefit Month: 11-2005

**New Budgets:**

Pgm Case	Program Case Name	Type	Eligible	Amount	UP/OP	Ovrd.
AABD/MED	PONY PATRICK	Regular	Pass	103.00		

**Previously Authorized Budgets:**

Pgm Case	Program Case Name	Program Case Number	Asst/Cat	Begin Date	End Date	Type	Elig	Amount	Issd	UP/OP	Ovrd.
AABD/MED	PONY PATRICK	54534309		10-01-2005	10-31-2005	Regular	Pass	103.00	N		

Review Authorize

Benefit Summary OK Cancel Help

**Result:** Update Case Review Date window displays.

- Highlight the next review date and select OK.

**NOTE:** You may still complete review updates in the Review/Recert task in Expert or Mainframe. This function is not for Food Stamp recertifications.

The screenshot shows a 'Budget Authorization' window with a title bar indicating 'Benefit Month: 11-2005'. Inside, there's a 'New Budgets:' section with a table. The table has columns: 'Pgm Case', 'Program Case Name', 'Program Case Number', 'Asst/Cat', 'Type', 'Eligible', 'Amount', 'UP/OP', and 'Ovrd.'. Below this, an 'Update Case Review Date' dialog box is open. This dialog has a 'Program Case:' field containing 'AABD/MED 54534309 PONY, PATRICK'. To its right is a 'Next Review Due By:' dropdown menu showing a list of dates from 02-28-2006 to 01-31-2007, with 11-30-2006 highlighted. Below these fields is a 'Review Due By:' field containing '11-30-2005'. At the bottom of the dialog are 'OK' and 'Cancel' buttons. The main window also has 'Previous', 'Benefit Summary', 'OK', 'Cancel', and 'Help' buttons at the bottom.

Pgm Case	Program Case Name	Program Case Number	Asst/Cat	Type	Eligible	Amount	UP/OP	Ovrd.
AABD/MED	54534309 PONY, PATRICK							

**Update Case Review Date**

Program Case: AABD/MED 54534309 PONY, PATRICK

Next Review Due By: 02-28-2006, 03-31-2006, 04-30-2006, 05-31-2006, 06-30-2006, 07-31-2006, 08-31-2006, 09-30-2006, 10-31-2006, **11-30-2006**, 12-31-2006, 01-31-2007

Review Due By: 11-30-2005

OK Cancel

Previous Benefit Summary OK Cancel Help

## BUDGETING

### ***AABD/ADC INCOME ALLOCATON (FIX)***

The budget process did not allocate when the AABD parent has only one ADC eligible child and this child is an unborn. This has now been fixed.

### ***ADC/MED GRANT UNDER \$10.00 (FIX)***

We will no longer offset the ADC grant if the grant amount is \$9.99 or less.

### ***ADC/MED 300% RULE (FIX)***

The 300% rule will now only consider children 18 or younger and a sibling of the minor parent with "In Household" status.

### ***ADC/TMA BUDGETS MAY NOW OFFSET AN OVERPAYMENT (NEW)***

You will now get a message asking if you want to offset the overpayment with the underpayment when there is an active Accounts Receivable for an ADC/TMA grant.

### ***FSP CALCULATE OPTIONAL WHEN CHILD SUPPORT ASSIGNED (CHANGE)***

Previously, when Child Support income was marked as assigned in the ADC and FSP cases, a pop-up message asking if you want to change the calculation appeared for the next month on the ADC case. However, running through the Calculate window was still mandatory for

the FSP case. With this release, if the Child Support is assigned in the previous FSP budget and the ADC case is still active, the pop-up message will now also appear for the FSP case. You will have the option of going through the Calculate window, or using the previously selected calculation method.

### ***FSP COUNTING OF PA GRANT (FIX)***

Currently if the FSP person is a FR in a PA grant the grant is not counted in the FSP budget. Example: ADC case with Mon and Unborn and Mom is FR, the FSP budget is not counting the ADC grant. This has now been fixed.

### ***FSP FAILURE TO COMPLY SANCTION - MULTIPLE HOUSEHOLD MEMBERS (FIX)***

If multiple household members are assessed for a FTC sanction, the FS budget will now only allow a maximum of 25% reduction of benefits. Previously, the budget was allowing a 25% reduction for each person.

### ***TRANSPORTATION MILEAGE (CHANGE)***

Transportation mileage amount has been increased to 40 cents per mile.

### ***OVERPAYMENT WINDOW EXPANDED (FIX)***

The Overpayment window has been expanded so the entire overpayment reason can be displayed.

## **BUDGETING-MED CONFIGURATION**

### ***MED CATEGORY CHANGE WHEN 1619B STATUS ENDS (FIX)***

Prior to this release, when a person had been coded as 1619B or State 1619B and the earnings ended, the worker had to manually update the medical category in configuration from 1619 b to AABD/MED. The system will now automatically reset the medical category code in configuration to AABD/MED when the earned or self-employment income has ended.

## **CASE MAINTENANCE**

### ***PARTICIPANT ACTIONS CLOSING STATUS (CHANGE)***

A confirmation window will inform you how your actions affect the participant status and the associated budgets. It is important to read the details of this window and follow the instructions given.

For example, on November 14, 2005, an AABD case with a husband and wife as case participants is opened effective 11-2005. Budgets are authorized through the come-up month of December. It is later discovered that one of the case participants should not be open, so she is closed through participant actions. After the action is OK'd, the Confirmation window appears.

The information on the top portion of the window confirms that the case participant was denied.

The lower portion of the window provides instructions on case actions that are required as a result of the participant action taken.

**Confirmation**

The following participants will be placed in this status as a result of this action:

Last Name	First Name	Date of Birth	PgmType	Role	Status	Begin Date
PONY	PATSY	10-01-1935	AABD/M...	Participant	Denied	12-01-2005
				Participant	Denied	11-01-2005

The following budget(s) of this program case is (are) being deleted or end dated. You must re-run Configuration and Budgeting up to and including 12-2005.

CaseName	PgmType	Category	Auth Amt	Budget Ty...	Begin Date	End Date	Create Date
PONY, PATR...	AABD/MED		583.00	Regular	12-01-2005		11-14-2005
PONY, PATR...	AABD/MED		583.00	Regular	11-01-2005	11-30-2005	11-14-2005

OK Cancel Help

**Budgets must be run when a participant has been closed from a program case.**

### ***CASE AND PARTICIPANT ACTIONS SANCTION STATUS REVIEW (TIP)***

When the warning pop-up window for previous budget, case, or person sanction appears after a pending or reopening a person or case, the sanction information should be viewed in the Expert System Summaries under the Sanction Summary task. This window appears when a budget sanction exists and also when a person or case was closed for reason of sanction.

If there was a closing for a reason of sanction, the only place this appears is in the Sanction Summary task, *not the Budget Sanction task.* These types of sanctions are recorded in the Sanction Summary for your information. Be sure to look at each TAB at the bottom of the window. Sanctions will appear under the correct TAB depending on the type of sanction: Budget, Case or Person.

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 Verifications  
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 Case Actions  
 Other Role Actions  
 Household Status  
 Participant Actions  
 PC Name/Payee  
 Prorate/Expedited (FS)  
 Review/Recertification  
 Eligibility  
 Configuration  
 Budgeting  
 Summaries  
 Benefit Summary  
 Case Summary  
 Sanction Summary  
 Utilities  
 Config/Budgeting List  
 CWIS

LAST NAME	FIRST NAME	DOB/EDD	AGE	NUMBER
LOW	BROOK	06-2004	1	53298956
325	Conv Drug ...	03-01-2006		Part... ADQ...

Help

Tasks Notices Budget Case Person

Running Sanction Summary

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### ***PROGRAM CASE NAME/PAYEE (TIP)***

Only the administrative Roles of Program Case Name and Payee can be established and updated in the Expert System. Only persons who are in the Program Case can be selected.

- Payee, Case Rep, Emergency Contact and NH Rep roles can be established in the mainframe and are no limited to being in the program case.

## **CORRESPONDENCE**

### ***ALL NOTICES CLEAN UP (FIX)***

Notices will no longer include previously closed participants.

### ***FSP EXPEDITED NOTICE (FIX)***

Prior to this release, when FS benefits were reduced the month following Expedited/Aggregate benefits due to unverified expenses no longer counting in the budget, the notice listed the reason for this change as an increase in income and/or an expense ending. The FSP Expedited Notice will now indicate the new amount for the second benefit month and the Expedited text will read:

"Since you needed food stamp benefits right away, your interview and/or some required verification may have been delayed. If your interview and/or some required verification were delayed, you were notified in writing, including the deadline date for providing the verification. No additional food stamp benefits will be issued until the delayed interview and/or delayed verifications are received. Your second and subsequent issuances may be reduced if expenses, such as housing costs, are not verified. If you begin receiving an ADC grant or the additional information shows that your food stamp benefits should be a smaller amount or that you are not eligible for food stamp benefits, this action will be taken without further notice to you."

### ***FSP PRORATE NOTICE WORDING (CHANGE)***

Wording has been changed on the FS benefits prorate notice in an effort to provide a clearer explanation when the benefits are prorated to zero. The notice now reads "Your application has been approved for mm-ccyy. Your benefit is prorated from your application date of mm-dd-ccyy. Since the prorated benefit is less than \$10 no benefit will be issued."

### ***FSP REPORTING CATEGORY NOTICE (FIX)***

When the only change to the FS case was the reporting category, the notice was listing the allotment amount on the budget (prior to any overpayment or sanction deductions). The notice will now list the actual authorized amount.

### ***FSP SANCTION NOTICE (FIX)***

When a person was added to an FS case at application or recertification and closed with the reason of sanction, the sanction reason was not displaying on the notice. The sanction reason will now display.

## **FAMILY RELATIONSHIPS TASK**

### ***'WIDOWED' RELATIONSHIP ADDED (NEW)***

Widowed has been added as a two-person relationship.

## MEDICARE TASK

### ***MEDICARE PART A AND B (TIP)***

If the Interface is showing a future end date do not put this date in for Medicare Part A or B. A future end date will cause problems on MMIS.

## REVIEW/RECERTIFICATION

### ***FSP SANCTION WARNING MESSAGE AT RECERTIFICATION (NEW)***

The sanction-warning message will now appear for FS cases at recertification when there is an existing instance of case or person sanction.

## UNEARNED INCOME DATA COLLECTION

### ***SOCIAL SECURITY ADJUSTMENT REASONS ADDED (NEW)***

Two new adjustment reasons have been added to the Unearned Income Data Collection task for Social Security. Persons who meet the definition of Disabled Early Widow/COBRA Widow or Disabled Adult Children as per 469NAC2-10.01B2a are entitled to continuation of Medicaid benefits even when their Social Security benefit exceeds standard Medicaid guidelines.

1. Add the gross amount of Social Security income.
2. Enter the amount to be subtracted from the gross income (so the Med will pass) in the Adjustment field. The gross income will be used in the FS budget.

The screenshot shows a software window titled "Add Unearned Income". It has three tabs: "Details", "Stable Amounts", and "Fluctuating Amounts". The "Details" tab is selected. Inside the tab, there are several input fields and dropdown menus. The "Amount" field contains "900.00". The "Adjustment Amount" field contains "82.00". The "Adjustment Reason" dropdown menu is set to "Disabled Adult Child". The "Begin Date" and "End Date" fields are empty. The "Verified By" dropdown menu is set to "Unverified". At the bottom right of the window, there are four buttons: "Next", "OK", "Cancel", and "Help".

3. Enter the appropriate Adjustment reason; begin date, and verification source.